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The State Bar of California
Request For Proposal: Questions & Responses
WordPerfect Retirement Project

Vendor Pre-bid Conference

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1.   **Do we have a breakdown of employee types that need training?**

Approximate employee inventory, by training type: General Staff (439), Paralegals (25), Legal Secretaries (20), Attorneys (59), Judges (7), and Executives (60). The Pilot subset inventory will be provided in a future posting.

2.   **Are we using any other "pleading formats" (other than California)?**

The State Bar of California has its own template for pleadings that is different from other State Judicial bodies, including Federal and State formats. Those other formats are used within the State Bar. Please include these formats in your proposals.

3.   **Do other departments have multiple *users*?**

No.

4.   **Is training mandatory for everyone?**

Yes.

5.   **Is there an *internal version* for each document?**

Still being investigated.

6.   **How are you going to identify the FOLDERS - by *document type*?**

Yes, by document type.

7.   **Are we using "level 1, 2, 3 etc." to classify documents?**

Yes.

8.   **Are we using DMS for document storage?**

Although the State Bar does use Hummingbird DMS in certain departments, the use of a DMS system for WordPerfect conversion is outside the scope of this RFP.

9.   **Who will provide selected documents for conversion? Each department?**

Yes. Each department will create an internal folder on the server that contains the Master Folder called <u>Docs to be Translated</u> then subfolders called <u>Type 1, 2, 3, and 4</u>. The subfolder naming convention to be determined.

10.   Will training sessions be in sequential order on site?

We are looking for a schedule that is short in duration (sequential or simultaneous) that is least disruptive to the attendees' regular schedules.

11.   Will there be any make-up classes to be offered?

Yes. There should be a make up class for the few people who will not be available for the regularly scheduled classes. If there is less than 10 people per site then there should be 1 makeup class for all of the attendees regardless of training type (one class will have to cover General Staff, Judges, Attorneys, etc. together).

12.   Will post conversion support need to be configured with new software?

The desktops will be all configured prior to the return from class of the attendees. The State Bar will be responsible for this task.

13.   Is there any strategy for post conversion?

We request that your proposal include a strategic roadmap of the post roll-out period.

14.   Is subcontracting allowed?

Yes.

15.   Can we recommend multiple contractors or just one?

You may recommend multiple contractors.

16.   Are there any internal resources shared between the Los Angeles and San Francisco offices?

No.

17.   Do we have multiple "training rooms?

Yes, there are 2 separate training rooms, one in Los Angeles and one in San Francisco. For the 10 people in Sacramento we will work with you either to conduct a separate class in Sacramento or bring the users to San Francisco for training.

18.   Are we offering evening sessions or just during the day (regular work hours)?

Regular working hour classes only, 8:45 am to 5 pm.

19.   Any other thoughts regarding Office 2003 vs. Office 2007 conversion?

Yes, but your proposal should only focus on conversion for Office 2003 only.